



# City of Marietta

205 Lawrence Street  
Post Office Box 609  
Marietta, Georgia 30061

## Meeting Agenda PENSION BOARD

*William F. Bruton, Jr., Post 1*  
*Joseph R. Goldstein, Post 2*  
*Cheryl Richardson, Post 3*  
*Rich Buss, Post 4*  
*Patina Brown, Post 5*  
*Bruce Bishop, Post 6*  
*Keisha Register, Post 7*  
*Patrick Bonito, Jr., Post 8*  
*Bobby Moss, Post 9*

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Wednesday, May 11, 2022

9:00 AM

Council Chamber

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### MINUTES:

**20220273      Regular Meeting - February 9, 2022**

Review and approval of the February 9, 2022, regular meeting minutes.

### BUSINESS:

**20220269      Pension Overpayment Recoupment Update**

Report from City Attorney regarding status of pension overpayment recoupment actions.

**20220191      MissionSquare Retirement 401(a) Administrative Services Agreement**

Review and approval of updated administrative services agreement on the 401(a) Supplemental Pension Plan with MissionSquare Retirement.

**20220448      Pension Board Legal Matters**

Discussion of the following legal matters:

- \* Required Minimum Distribution process (Article V, Section 7) and the case of Lois Marr, terminated vested participant.
- \* Conservatorship requirements for participant contribution refund, minor children of Clayton Culpepper, deceased former participant.

**20220278 Pension Valuation Report**

Presentation and discussion of pension valuation report by Clark Weeks.

**20220274 General Pension Report**

Presentation of 1st Quarter, 2022 General Pension report by CBIZ.

**20220280 Quarterly Securities Litigation Update (Pension Fund)**

Presentation of the 1st Quarter, 2022 Securities Litigation Update from KTMC.

**20220275 Supplemental Pension Report**

Presentation of 1st Quarter, 2022 Supplemental Pension report by AndCo, including the plan restatement.

**20220277 Retirement Applications and Related Business**

Review and approval of retiree and survivor applications.

**20220276 Pension Education Update**

Pension education update provided by Board Secretary.

**20220279 Pension Board Legislative Update**

Review of recent local, state, or federal actions affecting pension plan.

**NEW BUSINESS:**

**ADJOURNMENT:**